

Year-End Reflection & Planning Worksheet

1 Welcome

2024 word/phrase:

Values:

1.)

2.)

3.)

4.)

5.)

Vision:

Legacy:

2 Consider the big picture

Headline for your current life stage:

3 Reflect on the past year

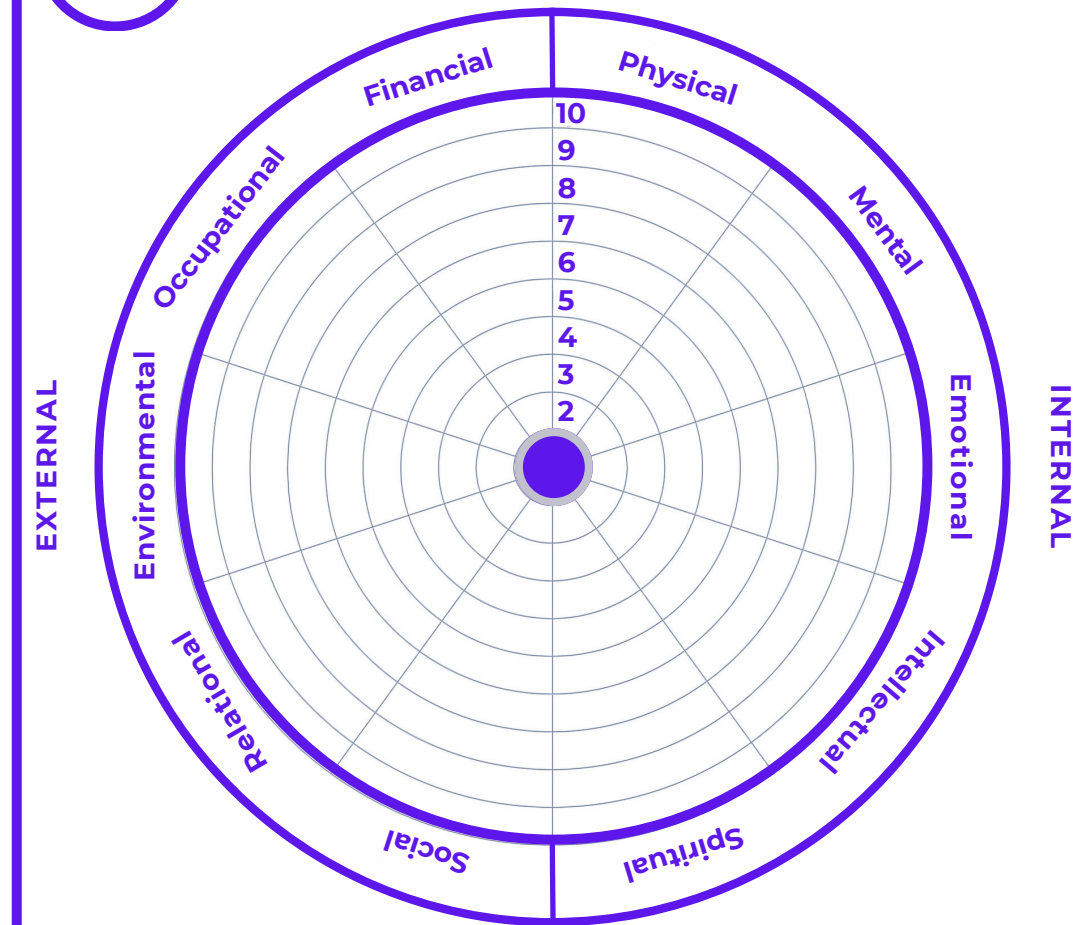
Win/Lose:

Learn:

Leave behind:

Bring forward:

4 Determine opportunities



5 Establish and test goals



Goal

1.)

2.)

3.)

Clarity

SMART?

Excited?

 Y N

 Y N

 Y N

 Y N

 Y N

 Y N

Feasibility

Obstacles? Plan? Support?

Alignment

Aligned? Adjust?

 Y N

 Y N

 Y N

 Y N

 Y N

 Y N

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6 Build your 2025 scorecard

Components	One	Two	Three
Goal			
Motivation			
Milestones			
Metrics			
Accountability plan			
Support/resources			

**ROLE
READY**

7 Conclude

First step:

Takeaway insight: